

Launching Online Re-Enrollment to Parents

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As of July 12, 2021, this "Learn Veracross" site has been deprecated. It will remain live at least through October 1, 2021, but will no longer be updated. All knowledge content has moved to the new [Veracross Community](#). Please update your bookmarks.

[Here is the new version of this article in the Veracross Community.](#)

Prior to the Launch

Before the ORE Portal is launched to re-enrolling families, the school must complete the following seven tasks.

Enter Amounts Overrides and Review Payment Configuration Settings

Before launching, be sure to confirm that all of the Amounts Overrides that apply have been properly configured for each household (tuition, deposits, fees, etc.). These overrides are entered on the "Override Amounts" tab on the person enrollment record, where they can also be edited and confirmed. Veracross recommends that this confirmation be made for each student.

Choose the Appropriate Portal Security Settings

It is important to carefully manage access to student accounts in the ORE portal. To this end, the appropriate security setting should be chosen for each adult involved in a student's re-enrollment. To do this, first run the "Manage ORE Access" query from the ORE home page. In the results, select and confirm the correct security setting for each related adult. The security options are found in the drop-down menu of the "Online Enrollment Access" column. These settings control access to online re-enrollment activity (Note: residency and legal custody are not factors in determining a related adult's access). Read carefully the following description of each of the following security options:

Read-Only:

Can only see the landing page and view a read-only version of the contracts, including viewing signatures, if there are any. No access to update contracts, the HPU form, or Enrollment Policies. Also cannot make payments.

Read-only + payments:

Same as read-only except that they can make payments.

Standard:

This matches the standard access all household parents with legal custody had in ORE 1.0. The person has permission to withdraw students, complete contracts, sign contracts, and make payments. They can also access the household profile update form. Enrollment policies can be viewed by people with standard enrollment access to a student, but they can only be updated by people in the same household as the student.

Standard + Signature required

Same as standard, except the person is *required* to sign the student's contract before it is considered complete. This means multiple signatures can be required for certain contracts involving complex legal/custody situations.

Note: When ORE is initially setup for a school, Online Enrollment Access for all related persons with custody will default to Standard.

Establish Parental Access to Update Household Profile

From this same query ("Manage ORE Access"), you are given the option to grant or restrict access for updating Household record data for ORE portal users. This is done via a check box in the query.

Assign On Hold Enrollment Statuses as Necessary

Determine which students should have a Hold Status applied to their account. The Hold Status allows the school to restrict online re-enrollment. Unlike closing portal access by way of the "Is Portal Open?" check box, placing a family's re-enrollment on hold does not simply block their access, it also presents the family with a personalized hold message explaining to them the reason for their status. Hold messages (entered in "Hold Notes" on the "general" tab of the person enrollment record screen) are drafted by the school and can be tailored for each student to communicate the meaning of the hold status as it sees fit. To put a student on hold, check the "Completed" box for the "Re-Enrollment on Hold" check list item on the Enrollment Checklist tab.

Add a Link in the Parent Portal

Online Re-enrollment will be accessed by parents from the Veracross Parent Portal. An ORE link can be added as a notification link or any other button or link component with the `{system:reenrollment}`

link. Use the notification link if filtering is not needed either for testing (see below) or to display to a group of parents (e.g., to open ORE for only upper school).

If the school wants to test the link with a small group of parents, then use the Notification link component, since this is the only one that supports group filtering. To set up a test link:

1. On the **System** homepage, add a group and to that group add several parents. It is recommended to add parents who are also staff or faculty. Reminder: The “Is Portal Open” field on the student’s enrollment record will need to be marked “Yes.”
2. In the **Parent Portal**, on the notification link component, apply that group as a filter.
3. Log in as one of the parents in the test group and test the link: click it and ensure that you are logged into the ORE portal as that parent.
4. Test with other parents, as desired.

Update the “Is Portal Open?” Field for all Re-enrolling Students

Run the “Find Re-enrollment” query from the online enrollment homepage. Batch update the “is portal open?” field to “yes” for all the students whose enrollment portal you’d like to have open. Once this field is turned on, the parents (who have “access”) will be able to re-enroll their students.

Launch Online Re-enrollment to Parents

When you are finally ready to launch online re-enrollment to parents, you will likely want to write an email (sent via email distribution list) to all re-enrolling families. It is likely you’ll want to use the system email group called “All Online Reenrollment Recipients” (found under the “RE-ENROLLMENT” group category when doing a “find groups” query). The Email Recipients for this group are defined as adults with the following four criteria:

- Has ORE access for a student.
- Enrollment type for student is “re-enrollment.”
- Student’s enrollment portal is marked as “open.”
- Student’s Online Enrollment Status is one of “(1/4) Eligible”, “(2/4) Contract Open”, “(3/4) Contract Complete”, or “(4/4) Complete”

The steps to LAUNCH/turn on re-enrollment are:

1. Make sure the portal link (discussed in step 5 above) is “enabled” and you’ve applied the appropriate filtering group (presumably “All Online Reenrollment Recipients”).
2. Double-check step 6 to make sure the “Is portal open?” flag is set for the correct students.

3. Click the “Refresh Group Membership” button from the “system” menu option to make sure your groups are refreshed.

4. Send an email to all parents via the Veracross email distribution list letting them know to log-in to the parent portal to launch re-enrollment. *Note:* Schools can include the email merge field {vc:reenrollment_link} so that parents are able to auto login as themselves to Online Re-Enrollment.

Please Note:

There are 2 additional related system email groups that may be of interest.

1. “Online Reenrollment Recipients In Process” – returns adults that meet the following criteria:

- Has ORE access for a student.
- Enrollment Type for student is “re-enrollment.”
- Student’s enrollment portal is marked as “open.”
- Student’s Online Enrollment Status is “(2/4) Contract Open”, or “(3/4) Contract Complete”.

2. “Online Reenrollment Recipients Completed” – returns adults that meet the following criteria:

- Has ORE access for a student.
- Enrollment Type for student is “re-enrollment.”
- Student’s enrollment portal is marked as “open.”
- Student’s Online Enrollment Status is “(4/4) Complete” and the adult does not have another student whose enrollment status is NOT “(4/4) Complete”.

For instructions for launching Online Enrollment to parents, [click here](#).
